



“100 Series” Curriculum: Course Offerings for New Financial Aid Professionals

Title	Description	Delivery Format	Duration	Existing/ New	Schedule	Frequency of Updates
Core Curriculum - Courses that provide a general, introductory overview of central elements of administering Title IV aid.						
COACH	A comprehensive introductory course on school requirements for administering postsecondary student financial aid (SFA) programs authorized under Title IV of the Higher Education Act (HEA). Modules can be completed individually, allowing individuals to tailor the training to their specific needs. <ul style="list-style-type: none"> ▪ Strongly Recommended as a pre-requisite for Fundamentals 	Web-based	9 modules, 36 lessons	Existing	Ongoing / Point of Need	Annually for release date early July (FSAU)
Fundamentals of Title IV	A basic but comprehensive course that covers all aspects of running the student financial aid programs, including: laws and regulations, administrative and financial systems, application processing, disbursing funds, and reporting requirements. <ul style="list-style-type: none"> ▪ Required for all CEO/President and financial aid administrators of schools seeking or awaiting initial certification as well as new or inexperienced FAAs who need to learn the basics of Title IV 	Classroom	4.5 days	Existing	Annually in each RTF (Total of 10 per year)	Annually after November 1 st (FSAU)
Untangling the Web	A beginner's course for the new financial aid professional on how to access websites related to understanding, participating in, and processing Federal Student Aid. The sites have been divided into different categories or steps in the Financial Aid process. Individuals learn to access all sites quickly from the School's Portal or IFAP.	Printed manual / Online tutorial	Self-paced	Existing (with new online tutorial)	Ongoing / Point of Need	As needed (FSAU)
Recommended Curriculum - Courses that provide more in-depth information regarding specific programs, processes, or jobs.						
EDExpress Basics	Available to all schools through the Internet. Focuses on teaching users basic skills required to access and navigate the EDExpress and Edconnect software. A beginning user learns the software functionality and practices using the software in a simulated environment. Phase I includes: Overview, Global and Application Processing; Phase II includes: Packaging, Pell, and Direct Loan Modules.	Web-based	Self-paced	Existing -- Phase I; Phase II release date June 03	Ongoing / Point of Need	Annually/as needed (FSAU)



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	<ul style="list-style-type: none"> Recommended as on-the-job training and re-training of financial aid office personnel who have day-to-day responsibilities for using EDEExpress 					
COD	<p>Includes six lessons with text to guide users through each area of the COD system. It simulates the COD web screens and functionality available to a School Administrator. Explores the basic navigation and functions of the COD website and provides practice locating and creating information in a safe environment with feedback to help you. The program uses fictitious data with over 350 students and 20 schools that offer a wide range of conditions and experiences.</p> <ul style="list-style-type: none"> Recommended for business officers and those who use Pell or Direct Loan 	Online CBT, downloaded from the Internet	Self-paced	Existing	Ongoing / Point of Need	Annually (COD team)
Delivery System Update	<p>Discusses annual changes and enhancements to the delivery system for the upcoming processing year.</p> <ul style="list-style-type: none"> Recommended for anyone who works with the application process (including FAFSA, FAFSA renewal, and ISIRs) 	Video conference	3 hours	Existing	Annually – November	Annually (FSAU)
Student Eligibility Issues	<p>Includes topics such as: eligibility criteria, need analysis, and verification. Specific topics may vary annually.</p> <ul style="list-style-type: none"> Recommended for new financial aid professionals and experienced professionals as a refresher 	May vary from year to year (including web-based, classroom, or video conference)	Varies based on format	New	Varies based on format	Annually (FSAU)
Reporting Issues	<p>Includes topics such as: Campus Security Reporting, Completion/Graduation Rates, Crime Reports, Consumer Information (Notices, Authorizations, and Publications), and FERPA.</p> <ul style="list-style-type: none"> Recommended for financial aid administrators and institutional professionals responsible for this reporting 	Web-based	Self-paced	New	Ongoing / Point of Need	As needed (FSAU)
Fiscal Management Training	Topics may include: Overview of Institutional Responsibilities, Record-keeping and Reporting and Requirements, Key Fiscal Procedures in the Campus-Based Programs, Accounting Procedures for Title IV	Classroom	2 days	Existing	Fall	Every 2 years or with each new issuance of the Blue



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	Programs, Obtaining, Managing, and Returning Title IV Funds, COD, Federal Updates, Questions & Answers. Recommended for financial aid officers and business officers					Book (FSAU)
FISAP Training	Explains what the FISAP is, why it is completed, required information and how to get it, what to watch for, how to determine appropriate requests, how to fill out and submit the FISAP on the Web, and what happens after it is submitted.	Web based tutorial	Self-paced	Existing		Annually, as needed (Campus Based Programs)
Sources of Additional Information - Includes sources of information beyond training courses, such as web sites and printed materials.						
FSA Handbook	A comprehensive guide for financial aid professionals, covering all aspects of the administration of the FSA Title IV programs. It includes individual volumes on each of the Title IV programs as well as volumes on the student application process, verification, student eligibility, and institutional eligibility. Written in plain language, it is designed as a practical, authoritative resource for financial aid professionals. It provides a full explanation of the programs, numerous examples and forms, and answers to many commonly asked questions encountered by those who must implement the Title IV laws and regulations at schools. It is updated annually and is available in both hardcopy and electronic formats.	Printed manual, also available online		Existing		Annually (Publications)
Blue Book	Provides guidance to school business office personnel who handle fiscal record keeping, accounting, and reporting functions for federal Title IV student financial aid programs authorized by the Higher Education Act of 1965, as amended (HEA). In addition, it provides a technical resource of Title IV management responsibilities that are shared between various administrative offices in a school. It also offers general information about Title IV programs, policies, and procedures that are useful to all institutional personnel who administer and manage Title IV programs.	Printed manual, also available online		Existing		Every 2 years (FSAU)



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Audit Guide	Includes documents regarding A-133 Single Audits, School/School Servicer Audits, Lenders/Lender Servicer Audits, Guaranty Agencies/Servicer Audits, etc. Schools are required to arrange for regular independent audits that include the operation of the Federal Student Aid programs. With eZ-Audit, schools can submit audit information on-line. For more details visit the eZ-Audit site and review the electronic announcements describing implementation, including Frequently Asked Questions and Registration Instructions .	Printed manual, available online		Existing	Annually, as needed	As needed (Schools/ Case Teams)
FSA Assessments	Provides a series of tools that schools can use to assess their procedures and to prevent and/or identify compliance issues, implement management enhancements for noted problems, and share effective practices. The assessments are organized into four categories, each with their own modules. The categories are: Students, Schools, Managing Funds, and Campus Needs.	Web tool				Annually
FSA Schools Portal		Web site				As needed (Schools)
State Conferences		Conference	Multiple during the year			For each conference (State/Reg. Organization)
FSA-Sponsored Conferences		Conference	Two in the Fall, One in the Spring			For each conference (Schools)